



Informatica® Cloud Application Integration  
October 2024

# Procure to Pay with Coupa and Netsuite

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# Preface

Use *Procure to Pay with Coupa and Netsuite* to learn how to generate invoice data for the approved Coupa purchase order based on a webhook request from Coupa. This guide assumes that you have an understanding of the NetSuite Connector, Coupa Connector, and Email Connector concepts.

## CHAPTER 1

# Introduction to Procure to Pay with Coupa and Netsuite recipe

The Procure to Pay with Coupa and Netsuite recipe is based on REST and SOAP APIs. Use the recipe to create a NetSuite purchase order and generate invoice from a Coupa purchase order based on a webhook request from Coupa as an incoming parameter.

The process is triggered by a webhook received from Coupa. The process retrieves all the information about the purchase order from the webhook body, such as, product, currency, shipping address, and supplier.

The process searches for vendors using the custom field custentity\_coupa\_id with the value from the Coupa supplier ID. The process then creates or updates a vendor record in NetSuite based on the supplier information.

The process then creates all the products in NetSuite. If a product with the same name already exists, it retrieves the product's ID instead of creating a new product. The process calculates the product price according to the exchange rate defined in NetSuite and saves the basic price value set in NetSuite.

The process then searches for an existing location in NetSuite based on the Coupa ID shipping address. If the location does not exist, it creates a specific location named Coupa ID <coupa shipping address ID>. The process then creates a purchase order based on the information from Coupa.

The process prepares an invoice process object and sends an email with the generated invoice data to the email specified for the requester in the Coupa purchase order.

The process then sends an email notification to confirm the successful process flow execution or to report any error encountered during the process.

The process does not update the existing purchase orders.

## Prerequisites

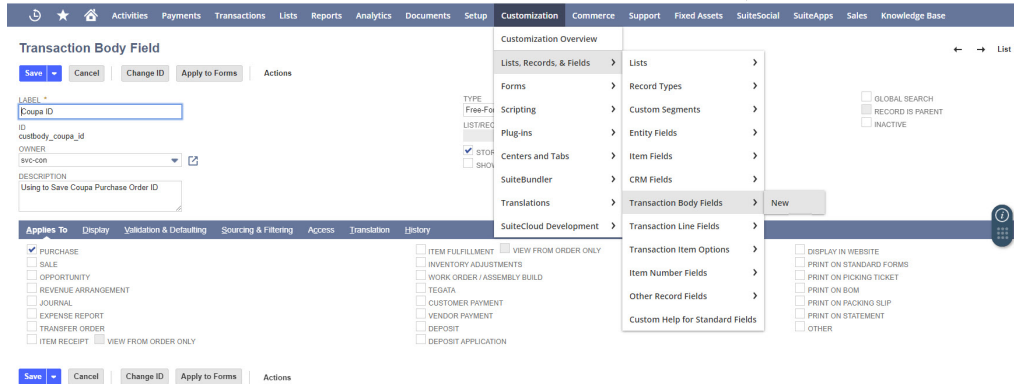
To create a NetSuite purchase order from a Coupa purchase order, the following prerequisites must be met:

- Create a custom field in the NetSuite purchase order and vendor entities.
- Create a webhook in Coupa.

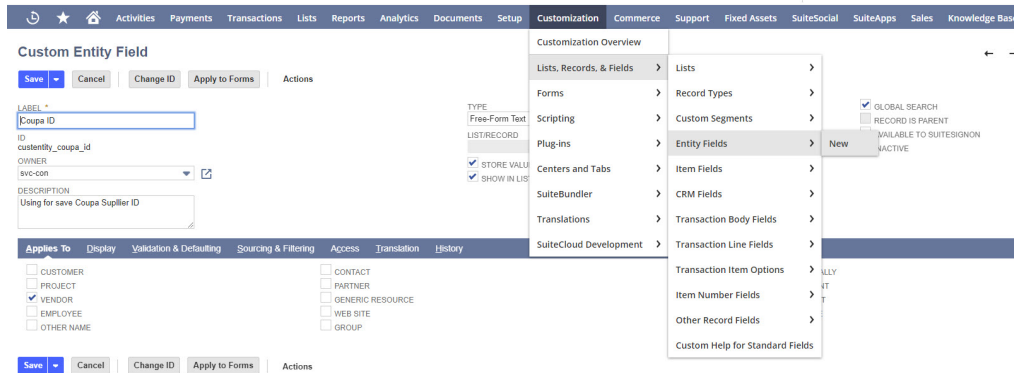
# Creating a custom field in NetSuite purchase order and vendor entities

Create a Coupa ID custom field in the NetSuite purchase order and vendor entities.

1. Log in to the NetSuite organization.
2. Go to **Customization > Lists, Records, & Fields > Transaction Body Fields > New**.  
The following image shows the **Transaction Body Field** page:



3. On the **Transaction Body Field** page, enter the value as Coupa ID in the **LABEL** field, custbody\_coupa\_id in the **ID** field, and select **PURCHASE** on the **Applies To** tab.  
These values are used to search for a matching purchase order.
4. Click **Save**.
5. Go to **Customization > Lists, Records, & Fields > Entity Fields > New**.  
The following image shows the **Custom Entity Field** page:



6. On the **Custom Entity Field** page, enter the value as Coupa ID in the **LABEL** field, custentity\_coupa\_id in the **ID** field, and select **VENDOR** on the **Applies To** tab.  
These values are used to search for a matching vendor.
7. Click **Save**.

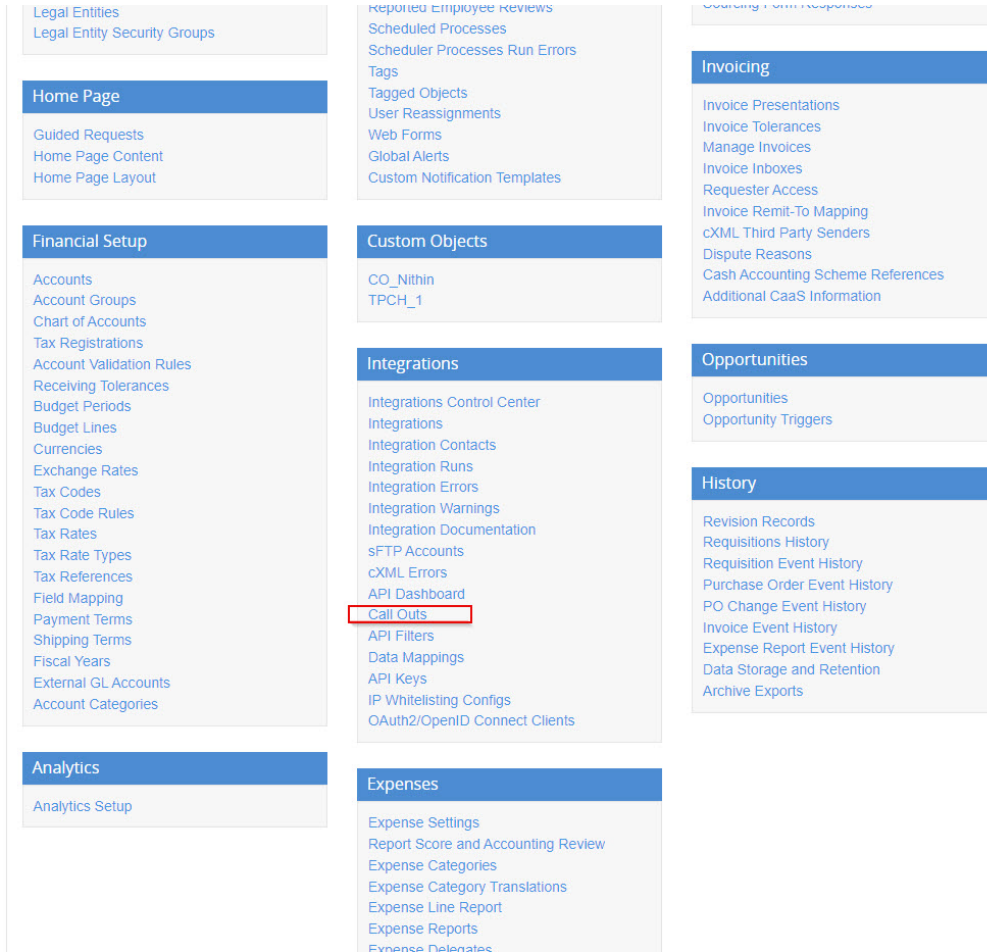
# Creating a webhook in Coupa

Webhooks send information from one system to another system when an event occurs.

To create a webhook in Coupa, perform the following steps:

1. Log in to the Coupa organization.
2. Go to **Setup > Integrations > Call Outs > Create**.

The following image shows the **Setup** page:



3. In the **Call Outs** page, enter values for the following fields:
  - In the **Name** field, enter the call out name.
  - From the **Call Out Type** list, select **Process Action**.
  - In the **Endpoint Detail** section, select **Create new** from the **Type** list, enter the service URL of the Purchase Order Flow process to be invoked in the **Host Name** field, select the authentication type as **Basic**, and enter the user name and password that is used to login to CAI organization.  
**Note:** The service URL will be generated after you publish the Purchase Order Flow process.
  - In the **Data Mapping / API Filter** section, from the **Filter** list, select the previously created purchase\_orders custom field.

The following image shows the **Call Outs** page:



All Setup Items Company Info Accounts Users Approvals Budget Periods Budget Lines

## Call Outs

\* Name

Call Out Type

Format

Contact Type  User  
 Group

Contact Name

Timeout (seconds)

Path

Compress

Require manual retry upon error

Endpoint Detail

\* Type  [Use Existing Endpoint](#)

Path

\* Host Name

Authentication Type  Basic  
 OAuth 2.0

User Name

Password

Data Mapping / API Filter

Data Mapping

Filter

4. Click **Create**.
5. Go to **Setup > Platform > Process Automator > Create new process**. The following image shows the **Setup** page:

## Setup

Find it fast! Use the Instant Filter  \*

<b>Company Setup</b> <ul style="list-style-type: none"><li>Company Information</li><li>Adoption Dashboard</li><li>Company Addresses</li><li>Users</li><li>Groups</li><li>Projects</li><li>User Form Responses</li><li>Departments</li><li>Categories</li><li>Commodities</li><li>Commodity Translations</li><li>Coupa Taxonomy</li><li>UNSPSC Commodity Mappings</li><li>Roles</li><li>Permissions</li><li>Content Groups</li><li>Approvals</li><li>Manage Delegates</li><li>Units of Measure</li><li>Inventory Warehouses</li><li>Inspection Codes</li><li>Security Controls</li><li>Custom Fields</li><li>Custom Field Translations</li><li>Lookups</li><li>Lookup Values</li><li>Dashboard Controls</li><li>Enterprises</li><li>Translations</li><li>Object Translations</li><li>Translation Suggestions</li><li>Machine Translations</li><li>Company Calendar</li><li>Legal Entities</li></ul>	<b>Procurement</b> <ul style="list-style-type: none"><li>Buying Policies</li><li>PO Customization</li><li>Featured iRequest Sites</li><li>Manage Requisitions</li><li>Manage Purchase Orders</li><li>Manage RFQs</li><li>Order Lists</li><li>Order List Lines</li><li>Price Comparisons</li><li>Purchasing Classification Engine</li><li>Requisition Line Form Responses</li></ul> <b>Platform</b> <ul style="list-style-type: none"><li>App Marketplace</li><li>'Ask an Expert' Categories</li><li>Custom Footer</li><li>Custom Objects</li><li>Export to Accounting</li><li>Forms</li><li>General Form Responses</li><li>Installed Apps and Content</li><li>Installed Marketplace Apps</li><li>IFrames and Panels</li><li>Menu Configuration</li><li>Notifications</li><li>Process Step History</li><li>Process Translations</li><li><b>Process Automator</b></li><li>Process Instances</li><li>Project Templates</li><li>Questionnaires</li><li>Reported Employee Reviews</li></ul>	<b>Suppliers</b> <ul style="list-style-type: none"><li>Business Entities</li><li>Supplier Instructions</li><li>Supplier Certificate Reminders</li><li>Supplier Link Requests</li><li>Suppliers</li><li>Remit-To</li><li>Contracts</li><li>Supplier Portal Directory</li><li>Supplier Portal Catalogs</li><li>Supplier Reviews</li><li>Supplier Review Form Response</li><li>Items</li><li>Item Labels</li><li>Punchout Sites</li></ul> <b>Inventory</b> <ul style="list-style-type: none"><li>Inventory Settings</li><li>Internal Suppliers</li><li>Fulfillment</li><li>Adjust Inventory</li><li>Warehouses</li><li>Warehouse Types</li><li>Default Receiving Locations</li><li>Cycle Count Types</li><li>Replenishment</li><li>Inventory Periods</li></ul> <b>Sourcing</b> <ul style="list-style-type: none"><li>Sourcing Settings</li><li>Sourcing Form Responses</li></ul>
--	--	---

6. In the **New Process** page, enter values for the following fields:
- In the **Name** field, enter the process name.
  - In the **Trigger** section, from the **Launch Process on** list, select **Document Event**, from the **Document** list, select **Purchase Order**, and from the **Trigger process on** list, select **Issued**.
  - In the **Perform Action** section, from the **Object** list, select **Trigger.Purchase Order**, from the **Action**, select **API Call Out**, and from the **Call Out** field, select the previously created call out.

The following image shows the **New Process** page:

All Setup Items   Company Info   Accounts   Users   Approvals   Budget Periods   Budget Lines

## New Process

\* Name

Description

This text will show on button hover

\* Priority

Active

### Trigger

\* Launch Process on  x

\* Document  x

\* Trigger process on  x

### Step 1

Perform Action

Object  x

\* Action  x

\* Call Out  x [Manage Call Outs](#)

API Call Out Response Variables

Variable Name  Set Response Path  + -

Conditions Match all conditions

Select     + -

+ Add Step - Delete Step

Cancel Save

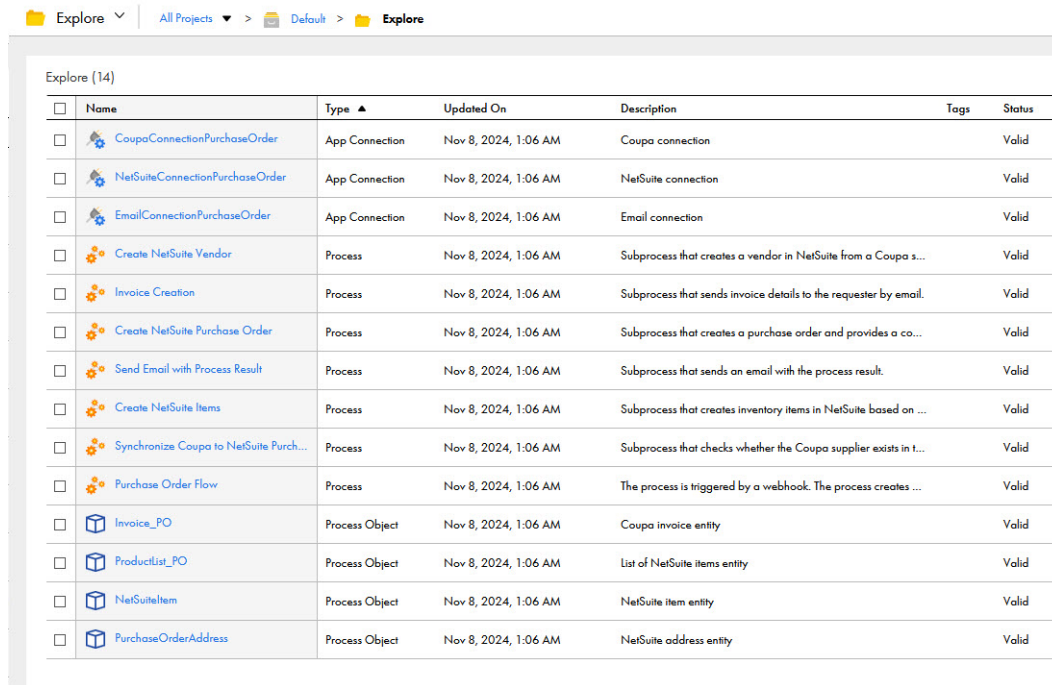
7. Click **Save**.

## CHAPTER 2















# Procure to Pay with Coupa and Netsuite recipe contents

The recipe contains multiple assets, such as process objects, app connections, and processes.

The following image shows the assets that the Procure to Pay with Coupa and Netsuite recipe package contains:



Explore [14]

<input type="checkbox"/>	Name	Type	Updated On	Description	Tags	Status
<input type="checkbox"/>	 CoupaConnectionPurchaseOrder	App Connection	Nov 8, 2024, 1:06 AM	Coupa connection		Valid
<input type="checkbox"/>	 NetSuiteConnectionPurchaseOrder	App Connection	Nov 8, 2024, 1:06 AM	NetSuite connection		Valid
<input type="checkbox"/>	 EmailConnectionPurchaseOrder	App Connection	Nov 8, 2024, 1:06 AM	Email connection		Valid
<input type="checkbox"/>	 Create NetSuite Vendor	Process	Nov 8, 2024, 1:06 AM	Subprocess that creates a vendor in NetSuite from a Coupa s...		Valid
<input type="checkbox"/>	 Invoice Creation	Process	Nov 8, 2024, 1:06 AM	Subprocess that sends invoice details to the requester by email.		Valid
<input type="checkbox"/>	 Create NetSuite Purchase Order	Process	Nov 8, 2024, 1:06 AM	Subprocess that creates a purchase order and provides a co...		Valid
<input type="checkbox"/>	 Send Email with Process Result	Process	Nov 8, 2024, 1:06 AM	Subprocess that sends an email with the process result.		Valid
<input type="checkbox"/>	 Create NetSuite Items	Process	Nov 8, 2024, 1:06 AM	Subprocess that creates inventory items in NetSuite based on ...		Valid
<input type="checkbox"/>	 Synchronize Coupa to NetSuite Purch...	Process	Nov 8, 2024, 1:06 AM	Subprocess that checks whether the Coupa supplier exists in t...		Valid
<input type="checkbox"/>	 Purchase Order Flow	Process	Nov 8, 2024, 1:06 AM	The process is triggered by a webhook. The process creates ...		Valid
<input type="checkbox"/>	 Invoice_PO	Process Object	Nov 8, 2024, 1:06 AM	Coupa invoice entity		Valid
<input type="checkbox"/>	 ProductList_PO	Process Object	Nov 8, 2024, 1:06 AM	List of NetSuite items entity		Valid
<input type="checkbox"/>	 NetSuiteItem	Process Object	Nov 8, 2024, 1:06 AM	NetSuite item entity		Valid
<input type="checkbox"/>	 PurchaseOrderAddress	Process Object	Nov 8, 2024, 1:06 AM	NetSuite address entity		Valid

# Procure to Pay with Coupa and Netsuite recipe assets

The following table lists the assets that the Procure to Pay with Coupa and Netsuite recipe package contains:

Asset Name	Asset Type	Description
ProductList_PO	Process object	List of NetSuite items entity.
Invoice_PO	Process object	Coupa invoice entity.
PurchaseOrderAddress	Process object	NetSuite address entity.
NetSuiteItem	Process object	NetSuite item entity.
NetSuiteConnectionPurchaseOrder	App connection	NetSuite connection.
EmailConnectionPurchaseOrder	App connection	Email connection.
CoupaConnectionPurchaseOrder	App connection	Coupa connection.
Create NetSuite Items	Process	Subprocess that creates inventory items in NetSuite based on Coupa products and prepares process objects to create purchase orders.
Create NetSuite Purchase Order	Process	Subprocess that creates a purchase order and provides a confirmation message.
Create NetSuite Vendor	Process	Subprocess that creates a vendor in NetSuite from a Coupa supplier or updates if it already exists.
Synchronize Coupa to NetSuite Purchase Order	Process	Subprocess that checks whether the Coupa supplier exists in the NetSuite vendor table. If the vendor does not exist, the process creates a vendor based on the supplier data. The process creates all the items and a purchase order.
Invoice Creation	Process	Subprocess that sends invoice details to the requester by email.
Send Email with Process Result	Process	Subprocess that sends an email with the process result.
Purchase Order Flow	Process	The process is triggered by a webhook. The process creates a purchase order in NetSuite based on the Coupa purchase order. When the purchase order is created, the process sends an email with the results.

## CHAPTER 3

# Using the Procure to Pay with Coupa and Netsuite recipe

To use the Procure to Pay with Coupa and Netsuite recipe, you must perform the following steps manually:

1. Copy and access the recipe.
2. Configure and publish the Email connection.
3. Configure and publish the Coupa connection.
4. Configure and publish the NetSuite connection.
5. Configure and publish the processes.
6. Invoke the process.

## Step 1. Copy and access the recipe content

Copy the pre-configured assets in the recipe to a separate project or folder.

1. Open the **Procure to Pay with Coupa and Netsuite** recipe and click **Use**.
2. Select the location where you want to copy the recipe, and then click **Continue**.
3. In the **Copying the recipe** dialog box, click **OK**.

It might take some time for the recipe to get copied. You will receive a notification when the recipe is ready for use.

4. After the recipe is copied, click **Explore** to access the recipe content.

- Navigate to the project or folder where you copied the recipe or enter the recipe name in the **Find** box. All the assets in the recipe are displayed as shown in the following image:

Name	Type	Updated On	Description	Tags	Status
CoupaConnectionPurchaseOrder	App Connection	Nov 8, 2024, 1:06 AM	Coupa connection		Valid
NetSuiteConnectionPurchaseOrder	App Connection	Nov 8, 2024, 1:06 AM	NetSuite connection		Valid
EmailConnectionPurchaseOrder	App Connection	Nov 8, 2024, 1:06 AM	Email connection		Valid
Create NetSuite Vendor	Process	Nov 8, 2024, 1:06 AM	Subprocess that creates a vendor in NetSuite from a Coupa s...		Valid
Invoice Creation	Process	Nov 8, 2024, 1:06 AM	Subprocess that sends invoice details to the requester by email.		Valid
Create NetSuite Purchase Order	Process	Nov 8, 2024, 1:06 AM	Subprocess that creates a purchase order and provides a co...		Valid
Send Email with Process Result	Process	Nov 8, 2024, 1:06 AM	Subprocess that sends an email with the process result.		Valid
Create NetSuite Items	Process	Nov 8, 2024, 1:06 AM	Subprocess that creates inventory items in NetSuite based on ...		Valid
Synchronize Coupa to NetSuite Purch...	Process	Nov 8, 2024, 1:06 AM	Subprocess that checks whether the Coupa supplier exists in t...		Valid
Purchase Order Flow	Process	Nov 8, 2024, 1:06 AM	The process is triggered by a webhook. The process creates ...		Valid
Invoice_PO	Process Object	Nov 8, 2024, 1:06 AM	Coupa invoice entity		Valid
ProductList_PO	Process Object	Nov 8, 2024, 1:06 AM	List of NetSuite items entity		Valid
NetSuiteItem	Process Object	Nov 8, 2024, 1:06 AM	NetSuite item entity		Valid
PurchaseOrderAddress	Process Object	Nov 8, 2024, 1:06 AM	NetSuite address entity		Valid

## Step 2. Configure and publish the Email connection

Configure the authentication type and details in the EmailConnectionPurchaseOrder connection, and then publish the connection.

- Open the **EmailConnectionPurchaseOrder** connection.
- From the **Type** list, select **IICS Cloud Application Integration Email Service (Licensed for use)**.
- From the **Run On** list, select **Cloud Server or any Secure Agent**.
- From the **Authentication Type** list, select **Password** or **OAuth** as needed. Based on the authentication type selected, perform one of the following steps:
  - For **Password** authentication, enter values for the following properties in the **Connection Properties** section:

Property	Description
Authentication	Select <b>Enable</b> . Email Connector authenticates the user name and password that you enter in the email connection properties.
User Name	User name to log in to the email server. The user name is either the account name or the email address that is used to send the email with the synchronization results. For example: <code>notifyme@mydomain.com</code>

Property	Description
Password	Password for the email address.
Security	Select <b>SSL</b> for the Email connection to use the SSL protocol.

Configure the following common properties on the connection creation page:

Property	Description
Host	Email server's DNS name, such as <code>mail.mydomain.com</code> , or an IP address, such as <code>192.168.1.1</code> .
Port	Port for communication between the Process Server and the email server. Default is <b>25</b> .

- For **OAuth** authentication, enter values for the following properties in the **Connection Properties** section:

Property	Description
Authorization URL	Enter the OAuth authorization URL for the email service that is used to authorize the user request. For example: <code>https://login.microsoftonline.com/xxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxx/oauth2/v2.0/authorize</code>
Token Request URL	Enter the OAuth token request URL that handles token requests. For example: <code>https://login.microsoftonline.com/xxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxx/oauth2/v2.0/token</code> The refresh token expires in 90 days. The user must authenticate again and publish the connection before the token expires.
Client ID	Specify the identifier value from the OAuth provider.
Client Secret	Enter the client secret to connect to the email application.
Scope	Specify the scope. The scope in OAuth authentication limits an application's access to a user's account. You can select multiple scopes for a single client. To enter multiple scopes, separate each value with a space. For a Microsoft Outlook email account, enter the following scope: <code>https://outlook.office.com/SMTP.Send offline_access</code>

Configure the following common properties on the connection creation page:

Property	Description
Host	Email server's DNS name, such as <code>mail.mydomain.com</code> , or an IP address, such as <code>192.168.1.1</code> .
Port	Port for communication between the Process Server and the email server. Default is <b>25</b> .

5. Save and publish the connection.



## Step 3. Configure and publish the Coupa connection

Configure the Coupa instance and client details in the CoupaConnectionPurchaseOrder connection, and then publish the connection.

1. Open the **CoupaConnectionPurchaseOrder** connection.
2. From the **Type** list, select **Coupa**.
3. From the **Run On** list, select **Cloud Server or any Secure Agent**.
4. In the **Connection Properties** section, enter values for the following properties:

Property	Description
Instance_Domain	The URL to access the Coupa instance.
Client_ID	The Coupa client ID to generate a valid access token.
Client_Secret	The Coupa client secret to generate a valid access token.
Scope	The Coupa security scope to access the resources.

5. Save and publish the connection.

## Step 4. Configure and publish the NetSuite connection

Configure the client ID, instance URL, certificate ID, and private key in the NetSuiteConnectionPurchaseOrder connection, and then publish the connection.

1. Open the **NetSuiteConnectionPurchaseOrder** connection.
2. From the **Type** list, select **NetSuite**.
3. From the **Run On** list, select **Cloud Server or any Secure Agent**.
4. In the **Connection Properties** section, enter values for the following properties:

Property	Description
Client ID	NetSuite OAuth 2.0 client ID to generate a valid access token. Enter the client ID that you generated from the <b>Integration</b> page in NetSuite.
Certificate ID	NetSuite certificate ID that you generated using <b>OAuth 2.0 Client Credentials</b> under <b>Setup &gt; Integration &gt; Manage Authentication &gt; OAuth 2.0 Client Credentials (M2M) Setup</b> in NetSuite.

Property	Description
Instance URL	NetSuite applications suite instance URL. Enter the instance URL in the following format: <code>https://[accountid].suitetalk.api.netsuite.com</code>
Certificate Private Key	NetSuite certificate private key. Enter the PKCS8 certificate as a Base64-encoded string in the following format:  -----BEGIN PRIVATE KEY----- ..... -----END PRIVATE KEY-----

5. Save and publish the connection.

## Step 5. Configure and publish the processes

Configure the allowed user or group for authorization, email ID for sending the notification, and subsidiary ID to create a vendor in NetSuite, and publish the process.

1. To publish the following processes, click **Actions** in the row that contains the processes in the order specified and select **Publish**.
  1. Create NetSuite Items
  2. Create NetSuite Purchase Order
  3. Create NetSuite Vendor
  4. Synchronize Coupa to NetSuite Purchase Order
  5. Invoice Creation
  6. Send Email with Process Result
2. Open the **Purchase Order Flow** process.
3. On the **Start** tab of the Start step, in the **Allowed Users** or **Allowed Groups** field, enter the user or group that has access to the process service URL at run time.
4. On the **Assignment** tab of the **Flow Settings** step, enter values for the following fields:
  - In the **User\_Email** field, enter the email ID to send the email notifications.
  - If your NetSuite environment uses a Subsidiary, in the **NetSuite\_Subsidiary\_ID** field, enter the subsidiary ID to create a vendor in NetSuite.
5. Save and publish the process.

## Step 6. Invoke the process

When you invoke the Purchase Order Flow process, the process creates a NetSuite purchase order from a Coupa purchase order based on the webhook request from Coupa.

1. Open the **Purchase Order Flow** process and click **Actions > Properties Details > Copy Service URL**.

2. Open a text editor and add the input fields and values to the service URL as shown in the following format:

```
<Cloud Application Integration POD URL>/active-bpel/public/rt/<API_name>?webhook=<Webhook request from Coupa>
```

3. Open a browser and paste the service URL.

You can also invoke the process using the Run Using option, REST or SOAP API endpoints in API clients, such as cURL, Postman, SOAP UI, or through any programming language.

## Rules and guidelines for using the recipe

You must update the process according to your Coupa and Netsuite service configurations as there are many possible limitations based on different service business rules. You can find some limitations in this topic that have been defined for the objects synchronized in the recipe process.

Consider the following rules and guidelines when working with the Procure to Pay with Coupa and Netsuite recipe:

- The **Subsidiary** field for both the vendor and items must be identical. This enforces a restriction on the currency used. The currency must be the same as the currency specified in the Subsidiary settings.
- Discounts and taxes are not synchronized from Coupa because these fields are configured separately for the instance and are applied based on the settings within NetSuite.
- When creating a purchase order, the process passes the exchange rate. However, you must check if the NetSuite settings allow you to modify this value.
- The process creates one purchase order for each vendor but the purchase order can contain many items.
- Coupa sends different webhooks for different suppliers. If the Coupa purchase order contains products from different suppliers, the process creates a different purchase order in NetSuite but the custom field Coupa ID remains the same.
- If several processes are triggered simultaneously for synchronization, for example, several opportunities for different suppliers, the process might fail because of the concurrency limitation in Netsuite.